

# Work with the Setup Menu

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To finish configuring and installing the software, or to access advanced server settings at any time after installation, run the Agiloft configuration utility Setup. To run Setup, open the file located in your Agiloft installation directory.

For initial installations on Windows, you will be prompted to run Setup once the initial installation steps are complete. For Linux installations, you may run Setup in console mode by accepting all defaults or in web mode by selecting Customized setup.

If you run the installer in GUI mode, or if you selected the custom setup option when running the installer in console mode, the embedded web server starts. You will be asked how to connect to it and in the case of local installation a web browser opens.

# Agiloft Setup Assistant

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After initial installation is complete, the Setup utility will guide you through a series of configuration steps.


## Language selection


Setup currently supports English, Russian and Chinese. The language selection page is displayed each time Setup is run. Select your language and click Continue.

Welcome to Agiloft Setup and Configuration Utility

Please select your language:

☒  English

☐  Russian

☐  Chinese

## Antivirus warning

You will be prompted to configure any antivirus software running on your system to exclude the Agiloft directory. After installation, the following paths must be excluded from your antivirus software:

- `AL_HOME/tmp/*.tmp*`
- `AL_HOME/tmp/#sql*`
- `AL_HOME/wildfly/standalone/log`
- `AL_HOME/logs/*.log`

When you are finished, click Continue.

Before installing, please configure your anti-virus software to exclude Agiloft files and temporary directories. Failure to do so will seriously impact system performance.

Please click "Continue" to finish configuration and start Agiloft, or "Cancel" to exit the setup utility.

# Installation method selection

Select Fully automatic setup to accept all defaults, and continue with the installation, summary or select Customized setup to control all configuration parameters. If you select Abort installer, you can run Setup and resume configuration later. The automatic setup does not allow you to define elements such as a custom SQL server

**Please click a link to select one of the following options:**

**Fully automatic setup**

Recommended for non-expert users. The Installer will automatically install and configure all components with their default options.

**Customized setup**

Recommended for expert users. Allows custom configuration of each individual component.

**Abort Installer**

Click this link to abort the installation process and quit. You can continue later, by running the Setup application located in your installation directory.

## Sample KB configuration

The installer offers two knowledgebase configurations:

1. CRM/Helpdesk/BPM - this offers a standard set of tables and features for most business purposes, that can be selected as required. For more information, see [Standard System](#).
2. ITIL/ITSM/BPM - this template is optimized for ITIL-compliant business environments.

### Sample KnowledgeBase (KB) configuration

Two sample templates are available, one focused on Contract Management and related functions, another focused on ITIL/ITSM.

Do you prefer to have your sample data: ☒ English ☐ Russian ☐ Chinese

☒ **Contract and Commerce Management**

☒ Contract Management

This template is optimized for contract and commerce management. It includes support for buy-side and sell-side contracts, regulatory compliance, general document management and related commercial processes.

Almost any business process can be managed and automated using Agiloft and this template includes prebuilt support for those shown below.

If you would like to narrow it down to include only the functions you need, deselect the checkbox to hide that function. It can still be re-activated later if you need it.

**Additional Processes**

☒ Document Management

☒ External Customer Support

☒ Field Service Support

☒ Customer Surveys

☒ Helpdesk / Internal Support

☒ Sales and Marketing Automation

☒ Project Management

☒ Asset Management

☒ Change Management

☒ Time Reporting

☐ **ITSM**

This template is optimized for ITIL compliance, with tables and processes designed to manage Service Requests, Incidents, Problems, Changes, Purchase Requests, Employee time-keeping and Configuration Items. In addition, it supports other processes that may be turned on for External Customer Support, Contracts, Sales and Marketing, and other general business processes

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## Licenses

If you are using the Agiloft Free Edition, fill out the form with your information and Agiloft will send you an email with licensing information. Both Free Edition and regular customer licenses must be installed after installation is complete. For more information, see [Licensing](#).

## Database Server

The server page allows you to define the server options, including the SQL database, and the Python, Perl and Nmap distributive locations.

## SQL Installation

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Agiloft can work with several database server types:

- An **embedded MySQL server** - this is the default, and included with Agiloft installations
- An **external MySQL server**
- An **external Microsoft SQL server**

Note that the last three are only available in the Customized Setup. Select which one to use on this page. For more information, see [Installation with Custom Databases](#).

**Database Server**

Please select the database server to use with Agiloft:

☒ MySQL 5.6.32

☒ Download MySQL5.6 distributive 
☐ Use downloaded MySQL5.6 distributive file 
☐ Use existing MySQL5.6 server

☒ Download MySQL JDBC driver distributive 
☐ Use downloaded MySQL JDBC driver distributive file

☒ PYTHON

☒ Download PYTHON distributive 
☐ Use downloaded PYTHON distributive file

☒ PERL

☒ Download Perl distributive 
☐ Use downloaded PERL distributive file

☐ Install attached file virus scanner ([more info](#))

☐ Install Nmap

☐ Download NMAP distributive 
☐ Use downloaded NMAP distributive file 
☐ Microsoft SQL Server
☐ Oracle

1. **Embedded MySQL server:** To use the embedded MySQL server, select MySQL and Download MySQL distributive; or select Use downloaded MySQLx.x distributive file and enter the file path. The default MySQL server requires almost no configuration. All you need to do is set a password for a database user with read-only access to Agiloft data, which Setup will create automatically. Click Next to view the auto-generated password. You will need to write it down.

### Database Server Settings

Provide necessary information for the selected SQL server here, so the Setup Assistant can configure it for Agiloft.

The built-in SQL server does not require any configuration and will be installed automatically.  
Write down the autogenerated password or set your own password for the database user named **ewreader**. This account has read-only access to the database and can be used to examine the data:

Use the InnoDB plug-in or the embedded InnoDB engine? ☒

In order to avoid the row limitation of 8KB with the InnoDB engine, which can be reached in the case of many fields, especially variable length fields, the InnoDB plug-in can be used. The InnoDB plug-in has additional benefits including performance improvements and optimized disk space usage, however, it increases the number of files in the MYSQL server data directory. Selecting the InnoDB plug-in option results in the Barracuda file format being used with dynamic row formatting.  
If you uncheck this box then the embedded MySQL server will be configured to use the embedded InnoDB engine.

2. **External MySQL server:** To use an external MySQL server, select MySQL and Use existing MySQLx.x server. Click Next to enter the database server settings on the following page. Enter valid values for all fields. The MySQL user needs administrator access rights in the database.

### Database Server Settings

Provide necessary information for the selected SQL server here, so the Setup Assistant can configure it for Agiloft.

You have chosen to use your own MySQL server. Before continuing, please ensure that your server meets the following requirements:

- InnoDB support must be turned on.
- InnoDB storage must be initialized with at least 400 megabytes of initial capacity, and the auto-increment attribute enabled.
- The following MySQL system variables must be set in the MySQL config file before it is started:
  - **max\_packet\_size** must be set to value **16M** or higher
  - **default-character-set** must be set to **utf8**
  - **default-collation** must be set to **utf8\_general\_ci**

MySQL Server Address

MySQL port   
*If your server uses a non-standard port number, please change it here, otherwise leave this field as is.*

Database Name   
*Specify the name of the database to use with Agiloft. Note that the database must already exist.*

MySQL User Login

MySQL Password

If your MySQL server is configured to use InnoDB plug-in version 1.0.17 or later then checking this box allows to avoid limitation of length of a single table record. ☒

3. **External MS SQL server:** To use an external MS SQL server, select Microsoft SQL server. Enter the connection settings on the following page.

**Database Server Settings**  
Provide necessary information for the selected SQL server here, so the Setup Assistant can configure it for Agiloft.

MS SQL Server Address

127.0.0.1

MS SQL port

1433

*If your server uses a non-standard port number, please change it here, otherwise leave this field as is. You can determine the port used by your server instance in the Server Network Utility (found in the Microsoft SQL Server program group on the Windows server where your database resides). Select the instance name from the drop down list and select TCP/IP from the list of enabled protocols. Then click the Properties button and note the listed port number.*

Database Name

sw2\_std

*Specify the name of the database to use with Agiloft.  
Note that the database must already exist.*

MS SQL User Login

aluser

MS SQL Password

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## Python, Perl, Nmap and Virus Scanner

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To select the Python, Perl and Nmap files, either use the default supplied distributives, or enter the location of a downloaded file in .zip format.

If you select Install attached file virus scanner, the installer will include ClamAV toolkit, which will scan any attached files for viruses. ClamAV can also use either the default supplied file, or a downloaded local file location. When implemented, the antivirus protection only scans attached files and has no effect on the rest of the operating system. For more information, see [www.clamav.net](http://www.clamav.net).

## Web Server Settings and Integration

Agiloft uses a built-in web server, Apache Tomcat, which can work with an external web server installed on the same machine. This means that requests to the web server will be redirected to Agiloft. You may set various configuration options for Apache Tomcat. Agiloft supports integration with Apache 2\* for all platforms and Information Information Services (IIS) for Windows.

### Web Server

The Web server is used to display a graphical interface to Agiloft for your staff and end users. Agiloft uses a built-in NGINX web server.

Please edit the web server configuration options below to fit your needs:

Enable https for NGINX HTTP server:	<input type="checkbox"/>
Open HTTP port for outside access	<input checked="" type="checkbox"/>
<i>This enables access to the HTTP port (default is port 8080) from any IP-address. If outside access to the HTTP port is closed, then access will only be granted from the localhost (this machine).</i>	
Main HTTP port	<input type="text" value="80"/>
<i>This is the main HTTP port used by the web server. For example if you enter <b>8080</b> here, Agiloft will be accessible by the following URL: <b>http://yourdomain.name:8080/gui2</b> If you do not run any other web server on this machine you can set this value to 80, otherwise set it to any other unused port.</i>	
Enable HTTPS port	<input type="checkbox"/> <input type="text" value="443"/>
<i>Enable the HTTPS port if you wish to use a secure protocol to connect to Agiloft. You may change the Apache Tomcat HTTPS port from the default value (8433) to any other unused port.</i>	
Keystore File	<input type="text"/>
<i>If you want to use an existing keystore to establish a secure connection, enter the full name of your keystore file here. If this field is left empty, a dummy certificate will be generated for you.</i>	
Keystore Password	<input type="password"/>
<i>If you are using your own existing keystore, enter the access password here. Otherwise leave this field unchanged.</i>	

**Enable https for NTINX HTTP server:** NGINX is installed by default on Linux, but not in Windows. If you are supplying server certificates, then HTTPS should be enabled; otherwise, only the HTTP port is needed. For more information, see: [NGINX Setup](#).

**Open HTTP port for outside access, Main HTTP port:** Apache Tomcat always listens on the port. On this page you may change the number of this port and open or close access from outside the local machine where Agiloft is installed.

**Enable HTTPS port, Keystore File, Keystore Password:** You may open Apache Tomcat's HTTPS port for listening. This allows you to have a trusted and secure connection with Agiloft. The standard HTTPS port is 443, but Apache Tomcat uses port 8443 for HTTPS connections by default.

Note: To enable HTTPS you will need a keystore file to keep track of your secure certificate(s). You may use your own keystore or have a dummy keystore certificate auto-generated on installation. To use your own keystore, enter the file name and passwords in the Keystore File and Keystore Password fields. To automatically generate a dummy keystore, leave the fields unchanged.

## Integration with Other Servers

Here you decide whether or not to integrate Agiloft with an external web server, and if so, what type of server.

### Web Server Integration

The built-in web server is configured automatically and no user input is required.  
Please click "Next" to continue.

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- a. No integration: If you choose not to integrate with an external web server, Apache Tomcat will be configured automatically. Click Next to continue.
- b. Integration with IIS: If you select integration with IIS, then no further configuration is needed. Click Next to continue.

### Web Server Integration

Microsoft IIS environment was detected on this machine.  
Setup assistant will now perform any necessary configuration. Please click "Next" to continue.

- c. **Integration with Apache:** If you select integration with Apache, Setup will automatically look for the Apache main configuration file. If no file is found, you can enter the full file path.

### Web Server Integration

Please specify additional parameters for your Apache 2 web server:

Apache 2 main config file. Please specify the full file path if it isn't detected automatically.

Forward both HTTP and HTTPS requests from the main web server to Tomcat's HTTP port. If unchecked then both HTTP and HTTPS requests from the main web server will be forwarded to Tomcat's secure HTTPS port instead. ☐

The Setup assistant will now check your Apache 2 setup and perform any necessary configuration.

Note: Based on your earlier selections, you will have either HTTP or HTTPS redirection, but not both. If you use HTTPS redirection, for example, all HTTP requests will be redirected to HTTPS also.

Apache HTTPS (SSL) must be properly configured before you select this option.

Apache Tomcat's HTTPS port should be opened for listening.

**Hotlink root server:** You should change the default "localhost" server name used in hotlinks and emails automatically generated by Agiloft to the hostname that is accessible to users through a standard URL, e.g. <https://support.agiloft.com>. This setting can also be changed later from the admin console once installation is complete.

### Hotlink root server

Server name as it will appear in automatically generated emails etc, it may be overwritten on a KB level using "hotlinkServerRoot" global variable

# Installation summary

Setup is now ready to complete the installation and configuration. Click Next when you are ready to continue. Installation can take 10-30 minutes depending on the computer. When Setup is finished, you will be redirected to the Setup main menu.

## Setup Wizard

Total RAM detected: 5.757053 Gb

Setting installation directory: /usr/local/Agiloft

Unpacking resources

[ [Click here if this page does not refresh automatically](#) ]

You can now access and begin using your system.

# If Something Goes Wrong

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If an error occurs during installation an error message is displayed in the progress page. There are two options after an error: you can either leave all installed files 'as is' while you determine the cause of the error, or you can completely uninstall Agiloft from the computer and save the installation logs for later debugging.

## Ignoring Import Errors

In some cases imported data when installing or importing may be corrupted and cannot be properly imported. You may wish to set a special import mode when SQL import errors produce warnings that are not fatal errors. We recommend that you do not use this option unless instructed to do so by a support or implementation specialist. Ignoring errors may result in a corrupted database.

## Setting ignore SQL errors mode in Unix

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Set the environment variable `ew.import.ignore.sql.errors` to the value `true`, then restart the application server. You must be logged in as the Unix root user to do this.

```
# ew.import.ignore.sql.errors=true
# export ew.import.ignore.sql.errors
# /etc/init.d/ew-server restart
```

This example is given for bash shell. If you use a different shell, consult its documentation on how to set and export environment variables. If you want to make this mode permanent, edit the `/etc/profile` Linux/Unix file, and add the following lines:

```
ew.import.ignore.sql.errors=true
export ew.import.ignore.sql.errors
```

Re-enter the Unix console session. To check if the environment variable is set correctly, execute the following command:

```
# export | grep ew.import.ignore.sql.errors
```

## Setting ignore SQL errors mode in Windows

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Set the environment variable `ew.import.ignore.sql.errors` to `true`, and then restart the application server.

1. Click **Start > (My) Computer > [Right-click] > Properties > Advanced > Environment Variables > System Variables > New**.
2. Enter the variable name `ew.import.ignore.sql.errors` and set the variable value to `true`. Press **OK**.
3. Run command line window by clicking **Start > Run...** Then type `cmd` in the Open field and press **OK**.

Restart the application server:

```
C:\> net stop ewserver  
C:\> net start ewserver
```

## Download Errors

If a download of external software fails in the installer, the error message will provide detailed information for troubleshooting. Depending on the context of the reason for the download failure, the error dialog will either report this message:

The installer could not download the file from the external source, possibly due to inadequate permissions. Please download the software manually and add it via the Use Downloaded Distribute File option when reinstalling.

Or something similar to this message:

Installation of database server failed due to a problem downloading <http://database-download.com/thirdpartysoftware/pool/mysql-connector-java-5.1.26.tar.gz88>. We tried four times for 160 seconds in total. The error message is: Can't get <http://database-download.com/thirdpartysoftware/pool/mysql-connector-java-5.1.26.tar.gz88> to `/usr/local/Agiloft/software/archives/mysql-connector-java-5.1.26.tar.gz`. You can manually download the file from <ftp://www.agiloft.com/thirdpartysoftware/pool>, save it on your computer, and use the "File Already Downloaded" option.

# Optimizing Tables

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In the bin directory there is a script named `optimize_tables`.

This script performs the mass execution of an `optimize table` SQL statement against a set of SQL tables. Running the script can often increase performance if tables have become unoptimized.